

1 **Emmy Klein (CONS/PE)** **Case No. 0602460**
 Atty Kruthers, Heather H. (for Public Guardian – former Conservator of the Person and Estate)
 Atty Worthan, Kirk (pro per – friend/Successor Conservator of the Person and Estate)
 Atty Wright, Janet L. (for Conservatee)

Probate Status Hearing Re: Filing Bond

Age: 72		KIRK WORTHAN , friend, was appointed Successor Conservator of the Person and Estate with bond set at \$85,000.00 on 09/23/14.	NEEDS/PROBLEMS/COMMENTS: 1. Need bond in the amount of \$85,000.00.
Cont. from		Minute Order from 09/23/14 set this matter for status regarding filing of the bond.	Note: a Hearing is currently set on 01/27/15 for filing of the Final Account of former Conservator.
<input type="checkbox"/>	Aff.Sub.Wit.		
<input type="checkbox"/>	Verified	Letters of Conservatorship have not issued to Mr. Worthan.	
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input type="checkbox"/>	Notice of Hrg		
<input type="checkbox"/>	Aff.Mail		
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202 Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
<input type="checkbox"/>			
			Reviewed by: JF
			Reviewed on: 11/12/14
			Updates:
			Recommendation:
			File 1 – Klein

Probate Status Hearing Re: Failure to File the Inventory and Appraisal and for
Failure to File a First Account or Petition for Final Distribution

DOD: 3-7-06		<p>HAL B. HAVLISCH was appointed Executor with Full IAEA without bond and Letters issued on 5-24-06.</p> <p>Final Inventory and Appraisal filed 10-27-06 indicated a total estate value of \$148,162.92, including \$3,517.92 cash plus real property, personal property including a stamp collection valued at \$1,500.00, and a vehicle.</p> <p>On 11-30-06, a Notice of Proposed Action was filed indicating that the Executor intended to sell the real property for \$100,000.00 cash.</p> <p>Nothing further was filed.</p> <p>On 12-20-13, the Court set this status hearing for failure to file a first account or petition for final distribution and mailed notice to Hal. Havlisch.</p> <p>Status Report filed 9-16-14 states the I&A was filed 10-27-06. On 11-30-06, a Notice of Proposed Action was filed, and Mr. Havlisch states a Notice of Proposed Action was filed 11-30-06. If this notice is not for the sale of the decedent's property, he will then be filing one so that he may sale the property.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Note: The Executor, attorney Hal B. Havlisch, was previously represented by attorney Thomas C. Peterson, now deceased.</p> <p>Note: The decedent's will devises the entire estate to GOOD SHEPHERD LUTHERAN HOME OF THE WEST in Fountain Valley, CA.</p> <p>1. Need first account or petition for final distribution or current written status report pursuant to Local Rule 7.5 which states in all matters set for status hearing verified status reports must be filed no later than 10 days before the hearing. Status Reports must comply with the applicable code requirements. Notice of the status hearing, together with a copy of the Status Report shall be served on all necessary parties.</p> <p>Examiner's Note: The Executor's status report filed 9-16-14 does not provide the status of the estate. Rather, it indicates that the Executor is unaware of the status.</p> <p>This estate has been open since 2006, to the detriment of the beneficiary, a charity. What is the status of the estate's assets? Has the house been sitting vacant these past 8 years, decreasing in value? Has it been rented, earning income for the estate? It is likely that the house has lost a substantial amount of value in the intervening years, and if this estate had been properly administered, would have been closed within a year. Have the personal property assets been sold? Is there an estate account? The Court may require that further status report be served on the beneficiary.</p> <p><u>The Executor may wish to review the Duties and Liabilities of Personal Representative form DE-147 that he signed and filed on 4-19-06, and may wish to seek legal advice from an attorney going forward.</u></p>
Cont'd from 31414			
Aff.Sub.Wit.			
Verified			
Inventory			
PTC			
Not.Cred.			
Notice of Hrg			
Aff.Mail			
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.			
Conf. Screen			
Letters			
Duties/Supp			
Objections			
Video Receipt			
CI Report			
9202			
Order			
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
FTB Notice			

Reviewed by: skc
Reviewed on: 11-12-14
Updates:
Recommendation:
File 2 – Muhley

**Probate Status Hearing Re: Failure to File the Inventory and Appraisal and for
 Failure to File a First Account or Petition for Final Distribution**

Age:			NEEDS/PROBLEMS/COMMENTS: <div style="text-align: center;"><u>OFF CALENDAR</u> Calendared in Error</div>	
DOD:				
Cont. from				
<input type="checkbox"/>	Aff.Sub.Wit.			
<input type="checkbox"/>	Verified			
<input type="checkbox"/>	Inventory			
<input type="checkbox"/>	PTC			
<input type="checkbox"/>	Not.Cred.			
<input type="checkbox"/>	Notice of Hrg			
<input type="checkbox"/>	Aff.Mail			
<input type="checkbox"/>	Aff.Pub.			
<input type="checkbox"/>	Sp.Ntc.			
<input type="checkbox"/>	Pers.Serv.			
<input type="checkbox"/>	Conf. Screen			
<input type="checkbox"/>	Letters			
<input type="checkbox"/>	Duties/Supp			
<input type="checkbox"/>	Objections			
<input type="checkbox"/>	Video Receipt			
<input type="checkbox"/>	CI Report			
<input type="checkbox"/>	9202			
<input type="checkbox"/>	Order			
<input type="checkbox"/>	Aff. Posting			
<input type="checkbox"/>	Status Rpt			
<input type="checkbox"/>	UCCJEA			
<input type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			
				Reviewed by: JF
				Reviewed on: 11/12/14
		Updates:		
		Recommendation:		
		File		

Atty Kharazi, H. Ty, sole practitioner (for Petitioner Thelda Mae Dodd, Trustee)

Fifth and Final Account and Report of Trustee and Petition for Its Settlement, for Allowance of Fees to Attorney and Resignation of Trustee

Age: 64 years	THELDA MAE DODD , Trustee, is	NEEDS/PROBLEMS/COMMENTS:
	Petitioner.	
		1. <i>Petition</i> states that on 11/13/2002, this Court ordered that the assets of the Conservatorship Estate of the Conservatee [Case 01CEPR00654, terminated on 12/11/2006] be transferred to the instant Special Needs Trust, and that Petitioner, who has been serving as Trustee of the trust since 11/13/2002, hereby resigns as Trustee due to her advanced age and failing health, and nominates the PUBLIC ADMINISTRATOR to serve as Successor Trustee. <i>Notice of Hearing</i> filed 10/8/2014 does not show the Public Guardian (as the appropriate entity to serve as Trustee) has been served with notice of this hearing along with a copy of the <i>Petition</i> , nor does the <i>Petition</i> state that the Public Guardian has consented to serve as successor trustee. Need consent to act as successor trustee from the Public Guardian.
Account period: 7/1/2012 – 6/30/2014		
Cont. from		
<input type="checkbox"/> Aff.Sub.Wit.	Accounting - \$53,041.72	
<input checked="" type="checkbox"/> Verified	Beginning POH - \$52,936.94	
<input type="checkbox"/> Inventory	Ending POH - \$51,041.72	
<input type="checkbox"/> PTC	(all cash; blocked account)	
<input type="checkbox"/> Not.Cred.		
<input checked="" type="checkbox"/> Notice of Hrg	Trustee - not addressed	
<input checked="" type="checkbox"/> Aff.Mail ^{W/}	Attorney - \$2,000.00	
<input type="checkbox"/> Aff.Pub.	(per Local Rule 7.16)	
<input type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv.		
<input type="checkbox"/> Conf. Screen	Petitioner prays for an Order:	
<input type="checkbox"/> Letters	1. Settling and allowing the Fifth and Final Account;	
<input type="checkbox"/> Duties/Supp	2. Approving and confirming all acts and transactions of the Trustee during the account period;	
<input type="checkbox"/> Objections	3. Authorizing the attorney fees; and	
<input type="checkbox"/> Video Receipt	4. Accepting the resignation of the Petitioner as Trustee of the Special Needs Trust, and appointing the Public Administrator as Successor Trustee.	
<input type="checkbox"/> CI Report		
<input checked="" type="checkbox"/> 2620		
<input checked="" type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		Reviewed by: LEG
<input type="checkbox"/> Status Rpt		Reviewed on: 11/12/14
<input type="checkbox"/> UCCJEA		Updates:
<input type="checkbox"/> Citation		Recommendation:
<input type="checkbox"/> FTB Notice		File 4 - Dodd

Status Hearing Re: Filing of the Next Account

DOD: 01/01/2014	CRAIG MACGLASHAN , son, was appointed Conservator of the person and of the estate on 05/17/2010.	NEEDS/PROBLEMS/COMMENTS:
	Letters issued on 05/25/2010.	
Cont. from 071114	Minute Order of 10/25/2012 set this status hearing for the filing of the Second Account.	1. Need Second Account or Petition for Final Distribution or current written status report pursuant to Local Rule 7.5 which states in all matters set for status hearing verified status reports must be filed no later than 10 days before the hearing. Status Reports must comply with the applicable code requirements. Notice of the status hearing, together with a copy of the Status Report shall be served on all necessary parties.
Aff.Sub.Wit.	Former Status Report of Counsel for Craig MacGlashan, filed 07/10/2014 states conservatee passed away on 01/01/2014 at St. Agnes Medical Center in Fresno, Ca. Conservator's first account covers the period beginning 05/24/2010, and ending 05/30/2011. Conservator is in the process of gathering documents to file the Final Accounting with the Court and anticipates to have it filed by the end of July 2014. Conservator has retained the services of this attorney for the conservatee's estate. It is anticipated that the Petition for Probate will be filed at the same time as the Final Accounting is filed with this Court.	
Verified		Note: Craig MacGlashan was appointed Executor with full IAEA authority without bond in the Estate of Jamie Elizabeth McGlashan on 08/20/2014.
Inventory		
PTC		Reviewed by: LV
Not.Cred.		
Notice of Hrg		Reviewed on: 11/12/2014
Aff.Mail		
Aff.Pub.		Updates:
Sp.Ntc.		
Pers.Serv.		Recommendation:
Conf. Screen		
Letters		File 5 - McGlashan
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202	Former Status Report of Counsel for Craig MacGlashan Conservator filed 08/07/2014 states on July 10, 2014, counsel for Conservator filed a Status Report with the Court. The status Report indicated that Counsel was in the process of gathering documents to file the Final Accounting by the end of July 2014. On July 18, 2014, Counsel filed the petition for probate of the estate of Jamie McGlashan, in Fresno Superior Court, case number 14CEPR00633. The hearing on the appointment of the petition is scheduled for August 20, 2014.	
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		

**Probate Status Hearing Re: Failure to File the Inventory and Appraisal and for
Failure to File the First Account or Petition for Final Distribution**

DOD: 8/24/2008	VICTORIA PUMAREJO was appointed as Executor with full IAEA authority and without bond on 9/7/10.	NEEDS/PROBLEMS/COMMENTS: 1. Need first account, petition for final distribution or current written status report pursuant to Local Rule 7.5 which states in all matters set for status hearing verified status reports must be filed no later than 10 days before the hearing. Status Reports must comply with the applicable code requirements. Notice of the status hearing, together with a copy of the Status Report shall be served on all necessary parties.
	Letters issued on 9/7/10.	
Cont. from 031414	Inventory and appraisal filed 11/5/14 showing the estate valued at \$175,000.00	
Aff.Sub.Wit.	First account or petition for final distribution was due December 2011.	
Verified	Creditor's Claim of the Auditor Controller/Treasurer-Tax Collector was filed on 12/17/10 in the amount of \$17,863.50.	
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: KT
		Reviewed on: 11/12/14
		Updates:
		Recommendation:
		File 6 – Maestas

Status Hearing Re: Filing of the First Account and/or Petition for Final Distribution

DOD: 06/24/10	ROGER ROWELL and DAVID E. ROWELL , were appointed as Co-Administrators with Full IAEA without bond on 02/17/11. Letters were issued on 02/17/11.	NEEDS/PROBLEMS/COMMENTS:
	On 10/21/11, David E. Rowell resigned as Co-Administrator. New Letters were issued to Roger Rowell as the sole Administrator on 11/01/11.	
Cont. from 121412, 020813, 031513, 061413, 110813, 031414, 071814	Inventory & Appraisal filed 11/29/11 shows an estate value of \$289,000.00 (1/7 th of a 40% interest in real property).	CONTINUED FROM 07/18/14 As of 11/12/14, nothing new has been filed since the last hearing.
Aff.Sub.Wit.	On 10/17/12, Thomas Markeson, filed a Motion to be Relieved as Counsel stating that there was a conflict regarding the administration of the estate which has made it impossible for him to continue representing Mr. Rowell in this matter.	Note: This is the 8 th status hearing on this matter since December 2012.
Verified		Note: The court removed Roger and David Rowell as Co-Administrators on 02/08/13 and appointed the Public Administrator.
Inventory	Order granting Attorney's Motion to be Relived as Counsel filed 11/26/12 relieved Mr. Markeson as counsel for Roger Rowell and set this matter for status re filing of the Accounting and Petition for Final Distribution. The Court also directed counsel to provide notice to Mr. Rowell regarding the filing of the account and/or petition for final distribution.	Letters of Administration were issued to the Public Administrator on 03/01/13.
PTC		1. Need Accounting and Petition for Distribution and/or current written status report.
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		

Status Hearing Re: Filing of the Inventory and Appraisal

DOD: 1-23-14	<p>DEBORAH FOULGER, Spouse, was appointed Executor with Full IAEA without bond and Letters issued on 4-15-14.</p> <p>At the hearing on 4-15-14, the Court set this status hearing for the filing of the Inventory and Appraisal.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>OFF CALENDAR</u></p> <p>I&A filed 10-14-14</p>	
Aff.Sub.Wit.			
Verified			
Inventory			
PTC			
Not.Cred.			
Notice of Hrg			
Aff.Mail			
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.			
Conf. Screen			
Letters			
Duties/Supp			
Objections			
Video Receipt			
CI Report			
9202			
Order			
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
FTB Notice			
		Reviewed by: skc	
		Reviewed on: 11-12-14	
		Updates:	
		Recommendation:	
		File 8 - Foulger	

Petition for Instructions

		LANCE HENRY LANDRE , Co-Trustee/beneficiary, is petitioner.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Continued from 10/7/14. As of 11/12/14 the following issues remain:</p> <ol style="list-style-type: none"> Petition states the trust consists of personal property located in California and a bank account in Tennessee, which is where Respondent lives. Following the death of the Trustor, Tamera Landre McDaniel kept the records and books concerning the Trust assets. Upon her resignation, the records and books were forwarded to Respondent at his home in Tennessee. Probate Code §17005 (a)(1) states the proper county for commencement of a proceeding pursuant to this division [Trust Law] is the following: (1) In the case of a living trust, the county were the principal place of administration of the trust is located. The pleadings indicate the co-trustee, the books and records and the bank account are all located in Tennessee. Therefore it appears that the proper venue for this action is in Tennessee. <p>Please see additional page 3 of 3</p> <p>Reviewed by: KT</p> <p>Reviewed on: 11/12/14</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 9 - Landre</p>
		Petition states that Petitioner is the duly actin co-trustee of the Trust and a 45% beneficiary.	
Cont. from 100714			
	Aff.Sub.Wit.		
✓	Verified	Respondent [LOWELL DEAN LANDRE] is also a Co-Trustee and 45% beneficiary of the Trust.	
	Inventory		
	PTC		
	Not.Cred.		
	Notice of Hrg	X Trustor [Lowell Henry Landre] died on 11/22/11. At the time of the Trustor's death, pursuant the terms of the Trust, Lance Henry Landre, Lowell Dean Landre and Tamera Landre McDaniel [granddaughter and 10% beneficiary] were appointed as co-trustees.	
	Aff.Mail		
	Aff.Pub.		
	Sp.Ntc.		
✓	Pers.Serv.	On 3/14/14, Tamera Landre McDaniel resigned as co-trustee leaving Petitioner and Respondent remaining.	
	Conf. Screen		
	Letters	More than 60 days ago, Petitioner and his attorney requested the trustee provide a complete accounting of all assets of the trust. To date Respondent has failed and/or refused to provide a true and correct accounting.	
	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
	9202		
	Order	X There remains assets which are trust assets that need to be distributed. Specifically, the Trust owns a 2003 Hummer. Petitioner has agreed to purchase the Hummer from the Trust for its appraised value of \$14,000.00.	
	Aff. Posting	Petitioner as co-trustee forwarded to Kathy Brewington, attorney for Respondent, the California Certificate of Title as it shows the owners as the three cotrustees. Following the agreement from Respondent's counsel to purchase the Hummer, there has been a complete breakdown of communication.	
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		
Please see additional page			

Additional page 1 of 3

Petitioner states that following the death of the Trustor, he removed all of the remaining personal property that was located in El Dorado County [where the Trustor resided prior to his death] which is subject to the trust and moved it to Fresno County. The trust provides that a Trustee in possession shall first deliver to any person any of the personal property if the Trustor expressed his wishes to that item. Thereafter the Trustee in possession shall divide any remaining assets 45% to Lowell Dean Landre, 45% to Lance Henry Landre and 10% to Tamera Landre McDaniel. As Trustee, Petitioner has set aside for Respondent and/or Tamera specific items designated by the Trustor. Petitioner as Trustee divided the remaining personal property 45% to Petitioner, 45% to Respondent and 10% to Tamera. Petitioner has waived any claim to the remaining personal property save and except the items he previously received from the Trustor or at the Trustor's discretion.

In addition to the personal property there exists a collection of coins. A proposed distribution of said coins has been provided to Respondent's attorney.

Petitioner's First Claim for Relief:

1. Following the death of the Trustor, cotrustees Lowell Dean Landre and Tamera Landre McDaniel assumed complete control over the financial affairs of the Trust including the maintenance of the checking account, locating assets of the trust, and filing tax returns.
2. Commencing in 2013 and continuing thereafter, Petitioner has requested Respondent provide him with a complete accounting of the Trust. Respondent has failed and refused to provide an accounting as required by the California Probate Code.

Petitioner's Second Claim for Relief:

1. On 6/17/14 Counsel for Respondent stated that the Trust accepted Petitioner's offer in the sum of \$14,000 to purchase the 2003 Hummer owned by the Trust.
2. Petitioner has deposited the sum of \$7,700 into his attorney's trust account with the instructions to deliver \$7,700 to Respondent's counsel when the Certificate of Title has been signed to transfer title to Petitioner.
3. Despite delivery of the funds and transmission of the Certificate of Title to Respondent's Attorney, Respondent refused to act to complete the sale of the 2003 Hummer.

Petitioner's Third Claim for Relief:

1. Respondent controls the checkbook for the Trust that contains an amount greater than \$35,000.00.
2. Respondent without consultation of Petitioner/cotrustee caused a 2013 tax return to be filed and failed to provide a true and correct copy to Petitioner.

Please see additional page

Petitioner's Fourth Claim for Relief:

1. Paragraphs of the Trust provide, "If Settlor leaves notes or a letter of instructions indicating the settlor's preferences for distribution of tangible personal property, then the settlor requests that the successor trustee of this trust who is in possession of this property honor these wishes."
2. Pursuant to cited portions of the Trust, Petitioner has distributed all the personal property in his possession to the beneficiaries of the Trust.

Petitioner's Fifth Claim for Relief:

1. In connection with the 2003 Hummer, Petitioner paid the 2014 DMVB fee of \$113 and purchased a battery in the sum of \$91.87. The battery was necessary as the Hummer would not start. In order to register the Hummer for 2014, a smog check was required and it could not be completed without a new battery.
2. On 7/30/14 reimbursement of the sum of \$204.87 was requested from Respondent.
3. To date respondent has refused to respond to the reimbursement request.

Petitioner prays:

1. That the Court order Respondent Lowell Dean Landre to provide a complete accounting for the Trust to Petitioner within 30 days of said order;
2. That the court order Respondent to complete the sale of the 2003 Hummer and sign the Certificate of Title. If he refuses, Petitioner requests the Court order the return of the Certificate of Title and direct that the clerk of the Court sign the Certificate of Title;
3. That the Court order Respondent to distribute to the beneficiaries the remainder of the Trust funds less reasonable set aside for taxes and preparation of tax returns;
4. That the Court enter an Order confirming the distribution of the personal property as set forth in Exhibits A & B;
5. That the Court order Respondent to reimburse Petitioner the sum of \$204.87 for purchasing a battery and California DMV Fees;
6. For costs of filing this petition;
7. For reasonable attorney fees for the filing of the petition.

Please see additional page

NEEDS/PROBLEMS/COMMENTS (cont.):

2. Petition does not include the names and addresses of each person entitled to notice of the petition. Probate Code §17201.
3. Notice of Hearing is not on the mandatory Judicial Council form as required. California Rules of Court, Rule 7.101(a).
4. Need proof of service of the Notice of Hearing on Tamera Landre McDaniel and any other person who may be interested in the trust.
5. Need Order

Atty **Boyajian, Thomas M. (for Joe L. Cabrera, Sr., Maria Dolores Cabrera, Maria Teresa Cabrera Sahagian, and Omero Cabrera – Siblings – Petitioners)**

Amended Petition to Determine Succession to Real Property

DOD: 6-28-14		JOE L. CABRERA, SR., MARIA DOLORES CABRERA, MARIA TERESA CABRERA SAHAGIAN, and OMERO CABRERA, siblings, are Petitioners. 40 days since DOD No other proceedings I&A: \$125,000.00 (real property located at 1401 Pine Street in Selma) Decedent died intestate Petitioner requests Court determination that the decedent's 100% interest in the real property passes to Petitioners, as Tenants In Common, each with 25% interest.	NEEDS/PROBLEMS/COMMENTS:	
Cont. From 101614				
<input type="checkbox"/>	Aff.Sub.Wit.			
<input checked="" type="checkbox"/>	Verified			
<input checked="" type="checkbox"/>	Inventory			
<input type="checkbox"/>	PTC			
<input type="checkbox"/>	Not.Cred.			
<input checked="" type="checkbox"/>	Notice of Hrg			
<input checked="" type="checkbox"/>	Aff.Mail			w
<input type="checkbox"/>	Aff.Pub.			
<input type="checkbox"/>	Sp.Ntc.			
<input type="checkbox"/>	Pers.Serv.			
<input type="checkbox"/>	Conf. Screen			
<input type="checkbox"/>	Letters			
<input type="checkbox"/>	Duties/Supp			
<input type="checkbox"/>	Objections			
<input type="checkbox"/>	Video Receipt			
<input type="checkbox"/>	CI Report			
<input type="checkbox"/>	9202			
<input checked="" type="checkbox"/>	Order			
<input type="checkbox"/>	Aff. Posting			
<input type="checkbox"/>	Status Rpt			
<input type="checkbox"/>	UCCJEA			
<input type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			
			Reviewed by: skc	
			Reviewed on: 11-12-14	
			Updates:	
			Recommendation: SUBMITTED	
			File 10 - Cabrera	

Atty Durost, Linda K., sole practitioner (for Petitioner Janice Sharp, Successor Trustee)

Petition for Order Confirming Trust Assets [850(a)(3)]

DOD: 11/26/2010		JANICE SHARP , daughter, is Petitioner. Petitioner states: <ul style="list-style-type: none"> Petitioner is the acting Successor Trustee and the sole Beneficiary of the ALDEAN E. BELLO LIVING TRUST dated 12/2/1997 (copy of Trust attached as Exhibit 1); Prior to the death of Aldean E. Bello on 11/26/2010 (copy of death certificate attached as Exhibit 2), she owned an undivided 50% interest in the real property on Ashcroft in Fresno; Aldean E. Bello had transferred that interest to her living trust prior to 11/27/2002; The other undivided 50% interest in the real property was held by Aldean Bello's only child, Petitioner, who had also placed her undivided 50% interest in the real property into her own joint revocable living trust with her husband (THE DONALD AND JANICE SHARP LIVING TRUST dated 5/21/1996); In approximately September 2002, both Aldean Bello and Petitioner discussed the need for funds in order to maintain the high level of physical care Ms. Bello required; The discussions led to a decision to refinance the mortgage on the Ashcroft house; Petitioner sought out a company to lend money on a new mortgage in order to get the necessary funds to care for her disabled mother; In order to qualify for the loan, the entire house was required by the loan company to be in Aldean Bello's individual name; <p align="center">~Please see additional page~</p>	NEEDS/PROBLEMS/COMMENTS: 1. Petition is signed but not verified by Petitioner pursuant to Probate Code § 1021 and CA Rule of Court 7.103.
Cont. from			
Aff.Sub.Wit.			
Verified	X		
Inventory			
PTC			
Not.Cred.			
Notice of Hrg	N/A		
Aff.Mail			
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.			
Conf. Screen			
Letters			
Duties/Supp			
Objections			
Video Receipt			
CI Report			
9202			
✓ Order			
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
FTB Notice			

Reviewed by: LEG
Reviewed on: 11/12/14
Updates:
Recommendation:
File 11 - Bello

Petitioner states, continued:

- Aldean Bello then transferred her undivided **50%** interest in the real property from her Trust to herself as an unmarried woman; the deed was recorded on 11/27/2002 (*copy attached as Exhibit 3*);
- Petitioner and her husband, as the Co-Trustees of their living Trust, then transferred Ms. Sharp's undivided **50%** interest in the real property out of their trust and to Aldean Bello as an unmarried woman in order to allow Aldean Bello to qualify for the loan; the deed was recorded on 11/27/2002 (*copy attached as Exhibit 4*);
- The recordation of both of these deeds was done consecutively and in the same refinance escrow along with the Deed of Trust which was recorded on 11/27/2002; the borrower reflects Aldean Bello and the lender is Pacific Republic Mortgage (*copy of Deed of Trust attached as Exhibit 5*);
- Since Petitioner had also given her interest in the property to her mother by deed, she was aware that it was the intention of both she and her mother to transfer the ownership of the Ashcroft property back into the **ALDEAN E. BELLO LIVING TRUST** after escrow was closed in order for Petitioner, as Successor Trustee, to have the power to administer her mother's trust assets after her mother's death;
- Unfortunately, Ms. Bello's health continued to decline and neither party thought about the title documentation again until after Ms. Bello's death;
- The property came up on a title search as being held in Ms. Bello's name individually, and that's when Petitioner became aware that both she and her mother had unintentionally not returned the property to the Trust; this was a very inadvertent error and not the intent of Ms. Bello.

Petitioner prays for an Order that:

1. The **ALDEAN E. BELLO LIVING TRUST dated 12/2/1997** is valid; and
2. The house located on Ashcroft in Fresno is an asset subject to the management and control of Petitioner as sole Trustee of the Trust.

Petition to Determine Succession to Real Property (Prob. C. 13151)

DOD: 05/18/2014		CYNDEE A. JORDAN , as Trustee of the Brock Living Trust, is petitioner.	NEEDS/PROBLEMS/COMMENTS:
		40 days since DOD	1. The Inventory and Appraisal does not list real property it lists a promissory note which is personal property. A petition requesting an order concerning real property only is not permitted under Probate Code §13151.
		No other proceedings	
Cont. from		I&A - \$55,355.71	2. Need Declaration pursuant to Local Rule 7.12.5 regarding distribution to Intervivos Trust.
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified	Will dated 11/10/2003 devises the residue of the estate shall pass to the Trustee of the Trust designated as the Brock Living Trust.	
<input checked="" type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC	Petitioner requests Court determination that decedent's 49.11% interest in Promissory Note dated December 22, 1997 pass to CynDee A. Jordan, as Trustee of the Brock Living Trust.	
<input type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg	w/	
<input checked="" type="checkbox"/>	Aff.Mail		
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
			Reviewed by: LV
			Reviewed on: 11/13/2014
			Updates:
			Recommendation:
			File 12 - Brock

Atty Durost, Linda K., sole practitioner (for Petitioner Janice Sharp, Successor Trustee)

Petition for Order Confirming Trust Assets [850(a)(3)]

DOD: 1/31/2013		CATHERINE JULIA MASON , daughter, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
		Petitioner states:	1. Pursuant to Probate Code § 17201, <i>Petition</i> does not but should state the names and addresses of each person entitled to notice of the <i>Petition</i> . Need proof of service by mail of 30 days' notice prior to hearing for all Trust beneficiaries pursuant to Probate Code §§ 15804(a) and 17203(a)(2), which may include the following persons named in the BETTY HORTON MASON LIVING TRUST:
		<ul style="list-style-type: none"> Petitioner is the acting Successor Trustee of the BETTY HORTON MASON LIVING TRUST as amended and restated on 8/6/2012 (copy of Trust attached as Exhibit 1); 	
Cont. from		<ul style="list-style-type: none"> Prior to the death of Betty Horton Mason on 1/31/2013 (copy of death certificate attached as Exhibit 2), she owned 3 parcels of real property (3rd Street and 5th Street residences and a vacant lot in Clovis); the vacant lot contiguous to the house on 5th Street in Clovis, APN 492-203-16, is the property subject to this petition (copy of deed showing vacant lot in Ms. Mason's name attached as Exhibit 3); 	<ul style="list-style-type: none"> Thomas E. Mason, son; Amy E. Mason, daughter; Mozelle Cate, sister; Margie L. Tinkler, sister; Matthew Mason, grandson; Amber D. Riggs, granddaughter; Natalie J. Bezzone, granddaughter; Troy Mason, grandson; Lee Mason, grandchild.
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input type="checkbox"/>	Notice of Hrg	X	
<input type="checkbox"/>	Aff.Mail	X	
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		

CATHERINE JULIA MASON, daughter, is Petitioner.

Petitioner states:

- Petitioner is the acting Successor Trustee of the **BETTY HORTON MASON LIVING TRUST as amended and restated on 8/6/2012** (copy of Trust attached as Exhibit 1);
- Prior to the death of Betty Horton Mason on 1/31/2013 (copy of death certificate attached as Exhibit 2), she owned 3 parcels of real property (3rd Street and 5th Street residences and a vacant lot in Clovis); the vacant lot contiguous to the house on 5th Street in Clovis, APN 492-203-16, is the property subject to this petition (copy of deed showing vacant lot in Ms. Mason's name attached as Exhibit 3);
- In early August 2012, Attorney Durost met with Ms. Mason in a skilled nursing facility for quite some time and believed her to be competent; however, she was very ill;
- Attorney Durost and Ms. Mason discussed the planning she needed and went over her real and tangible personal properties list;
- Attorney Durost prepared an amended and restated living trust for her, durable powers, a bill of sale for her tangible personal property, and deeds transferring the two residential (3rd Street and 5th Street residences) into the Trust;
- At that time, she apparently did not remember she also owned a vacant lot next to her 5th Street house (APN 492-203-16) and did not inform Attorney Durost of that property;

~Please see additional page~

NEEDS/PROBLEMS/COMMENTS:

1. Pursuant to Probate Code § 17201, *Petition* does not but should state the names and addresses of each person entitled to notice of the *Petition*. Need proof of service by mail of 30 days' notice prior to hearing for all Trust beneficiaries pursuant to Probate Code §§ 15804(a) and 17203(a)(2), which may include the following persons named in the **BETTY HORTON MASON LIVING TRUST:**

- Thomas E. Mason, son;
- Amy E. Mason, daughter;
- Mozelle Cate, sister;
- Margie L. Tinkler, sister;
- Matthew Mason, grandson;
- Amber D. Riggs, granddaughter;
- Natalie J. Bezzone, granddaughter;
- Troy Mason, grandson;
- Lee Mason, grandchild.

Reviewed by: LEG

Reviewed on: 11/12/14

Updates:

Recommendation:

File 13 - Mason

Petitioner states, continued:

- Unfortunately, Attorney Durost did not do a title search for all properties that may have been in her name, believing her to be astute enough during the initial interview to fully inform her of her estate assets;
- Attorney Durost prepared deeds to transfer the 3rd Street and 5th Street residences in the Trust, as well as whatever tangible personal property that was appropriately transferable (the 3rd Street residence is not relevant here);
- The deed transferring the 5th Street residence into the Trust was recorded on 8/13/2012 (*copy of Deed attached as Exhibit 4*);
- A deed then transferring the 5th Street residence into the name of Petitioner, Successor Trustee of the Trust, is further supporting documentation that the intent of Ms. Mason was that all of her properties be transferred to her trust so that her daughter could administer and distribute the properties as Ms. Mason wished;
- The non-transfer of the vacant lot was an inadvertent error [*emphasis in original*] on behalf of both Ms. Mason and Attorney Durost;
- The real property (both the 5th Street house and the contiguous vacant lot) is now under a contract of sale and the closing date is scheduled for 11/13/2014;
- Attorney Durost is asking on behalf of Petitioner that this matter be heard on an expedited basis.

Petitioner requests that the Court order under the authority contained in Probate Code § 850(a)(3) the following:

3. The **BETTY HORTON MASON LIVING TRUST as amended and restated on 8/6/2012** is valid; and
4. The real property consisting of a vacant lot contiguous to the house on 5th Street in Clovis, APN 492-203-16, is an asset subject to the management and control of Petitioner as sole Trustee of the Trust.

DOD: 02/14/12		RICHARD DEWAYNE PHILLIPS , father, was appointed Administrator with Full IAEA and without bond on 12/04/12.	NEEDS/PROBLEMS/COMMENTS: <u>CONTINUED FROM 01/24/14</u> As of 11/12/14, nothing further has been filed. 1. Need Inventory & Appraisal and Need Report of Personal Representative and Petition for Distribution and/or current written status report.
		Minute Order from hearing on 12/04/12 set this matter for status regarding filing of the First Account and/or Petition for Final Distribution.	
Cont. from 012414		Status Report filed 11/12/14 states: On 04/15/13, Petitioner, in his capacity as personal representative of decedent's estate, filed a complaint against the County of Fresno and other defendants in United States District Court, Eastern District of California, alleging violation of the decedent's civil rights. The lawsuit is based on the fact that decedent was murdered while in custody of Fresno County and is still ongoing. The complaint was filed by Anthony Boskovich, Esq. of the Law Office of Anthony Boskovich in association with the law firm of Bode & Grenier, LLP. On 06/11/13, the County of Fresno filed a Motion to Dismiss the lawsuit. On 12/03/13, the Court granted the Motion in part and denied the motion in part. On 12/31/13, Petitioner filed a First Amended Complaint against all defendants, including the County of Fresno. A trial in the matter has been set for 06/23/15 and is expected to last approximately 10 days. At this time, there are no assets in the Decedent's estate except for the causes of action currently being litigated in federal court. Petitioner requests the Court set a further status conference in March or April 2015.	
Aff.Sub.Wit.			
Verified			
Inventory			
PTC			
Not.Cred.			
Notice of Hrg			
Aff.Mail			
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.			
Conf. Screen			
Letters			
Duties/Supp			
Objections			
Video Receipt			
CI Report			
9202			
Order			
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
FTB Notice			
			Reviewed by: JF
			Reviewed on: 11/12/14
			Updates: 11/13/14
			Recommendation:
			File 14 – Phillips

Status Hearing Re: Filing of the Inventory and Appraisal

DOD: 01/16/2014		<p>LEE X. YANG, was appointed Administrator with full IAEA authority without bond on 06/17/2014.</p> <p>Letters issued 07/23/2014</p> <p>Minute Order of 06/17/2014 set this matter for the Status Hearing of the filing of the Inventory and Appraisal.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>OFF CALENDAR</u></p> <p>Inventory and Appraisal filed 11/12/2014.</p>
Cont. from			
<input type="checkbox"/>	Aff.Sub.Wit.		
<input type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input type="checkbox"/>	Notice of Hrg		
<input type="checkbox"/>	Aff.Mail		
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
		<p>Reviewed by: LV</p> <p>Reviewed on: 11/12/2014</p> <p>Updates: 11/13/2014</p> <p>Recommendation:</p> <p>File 15 - Lee</p>	

		NEEDS/PROBLEMS/COMMENTS: <u>OFF CALENDAR.</u> Inventory and Appraisal filed 08/15/2014.					
Cont. from							
<input type="checkbox"/> Aff.Sub.Wit.							
<input type="checkbox"/> Verified							
<input type="checkbox"/> Inventory							
<input type="checkbox"/> PTC							
<input type="checkbox"/> Not.Cred.							
<input type="checkbox"/> Notice of Hrg							
<input type="checkbox"/> Aff.Mail							
<input type="checkbox"/> Aff.Pub.							
<input type="checkbox"/> Sp.Ntc.							
<input type="checkbox"/> Pers.Serv.							
<input type="checkbox"/> Conf. Screen							
<input type="checkbox"/> Letters							
<input type="checkbox"/> Duties/Supp							
<input type="checkbox"/> Objections							
<input type="checkbox"/> Video Receipt							
<input type="checkbox"/> CI Report							
<input type="checkbox"/> 9202							
<input type="checkbox"/> Order							
<input type="checkbox"/> Aff. Posting							
<input type="checkbox"/> Status Rpt							
<input type="checkbox"/> UCCJEA							
<input type="checkbox"/> Citation							
<input type="checkbox"/> FTB Notice							
		<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="height: 20px;">Reviewed by: LV</td> </tr> <tr> <td style="height: 20px;">Reviewed on: 11/12/2014</td> </tr> <tr> <td style="height: 20px;">Updates:</td> </tr> <tr> <td style="height: 20px;">Recommendation:</td> </tr> <tr> <td style="height: 20px;">File 16 - Shubin</td> </tr> </table>	Reviewed by: LV	Reviewed on: 11/12/2014	Updates:	Recommendation:	File 16 - Shubin
Reviewed by: LV							
Reviewed on: 11/12/2014							
Updates:							
Recommendation:							
File 16 - Shubin							

17 Gabriel Carrillo, Valerie Perez, Daniel Perez, Ebony Perez (GUARD/P)
Case No. 08CEPR00913

Atty Rodriguez, Maria Eloisa (pro per -

Petition for Appointment of Guardian of the Person (Prob. C. 1510)

Valerie, age 13		<p align="center"><u>NO TEMPORARY IN PLACE:</u> <u>TEMPORARY DENIED ON 10/01/14</u></p> <p>MARIA ELOISA RODRIGUEZ, Paternal Aunt, is Petitioner.</p> <p>Father: ANGEL PEREZ - Personally served 9-17-14; Consents and waiver of notice filed 11/10/14</p> <p>Mother: ENEDINA CARRILLO - Personally served 9-17-14; Consent & Waiver of Notice filed 11/10/14</p> <p>Paternal Grandfather: UNKNOWN Paternal Grandmother: SARA LOY - Consents and waives notice</p> <p>Maternal Grandfather: UNKNOWN Maternal Grandmother: NORA CARRILLO - Personally served 9-17-14</p> <p>Minor Valerie Perez was personally served 9-17-14; Consents and waives notice</p> <p>Petitioner states the parents are not stable. Valerie and Daniel stay with their grandmother Nora. The mother leaves for days at a time with Ebony. The father is aware that the mother is living at another address with just her and Ebony. The mother may have a substance abuse problem. The children are left alone at times without supervision. The father is unable to care for the children at this time due to his living arrangement. The father has asked Petitioner to act as guardian while the parents get situated.</p> <p>Court Investigator Dina Calvillo filed a report on 11/10/14.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Note: This petition is for minors Valerie, Daniel, and Ebony only. Maternal Uncle Nicholas Carrillo, Jr., was appointed Guardian of the minor Gabriel Carrillo on 11-6-13.</p> <p>Note: Petitioner resides in Tulare, CA. The children have been residing in Fresno County with their maternal grandmother and mother.</p> <p>1. Need proof of service by mail at least 15 days before the hearing of Notice of Hearing with a copy of the Petition for Appointment of Guardian of the Person <u>or</u> Consent & Waiver of Notice <u>or</u> Declaration of Due Diligence for:</p> <p>a. Paternal grandfather b. Maternal grandfather</p>	
Daniel, age 10				
Ebony, age 5				
Cont. from				
<input type="checkbox"/>	Aff.Sub.Wit.			
<input checked="" type="checkbox"/>	Verified			
<input type="checkbox"/>	Inventory			
<input type="checkbox"/>	PTC			
<input type="checkbox"/>	Not.Cred.			
<input checked="" type="checkbox"/>	Notice of Hrg			
<input type="checkbox"/>	Aff.Mail			X
<input type="checkbox"/>	Aff.Pub.			
<input type="checkbox"/>	Sp.Ntc.			
<input checked="" type="checkbox"/>	Pers.Serv.			w/
<input checked="" type="checkbox"/>	Conf. Screen			
<input checked="" type="checkbox"/>	Letters			
<input checked="" type="checkbox"/>	Duties/Supp			
<input type="checkbox"/>	Objections			
<input type="checkbox"/>	Video Receipt			
<input checked="" type="checkbox"/>	CI Report			
<input type="checkbox"/>	9202			
<input checked="" type="checkbox"/>	Order			
<input type="checkbox"/>	Aff. Posting			
<input type="checkbox"/>	Status Rpt			
<input checked="" type="checkbox"/>	UCCJEA			
<input type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			

Atty Lanier, Brandi

Atty Lanier, Kenneth

Status Hearing Re: Filing of the Proof of Establishing a Guardianship in Missouri

		BRANDI CHAVONNE LANIER , guardian, filed an ex parte Petition to Fix Residence Outside the State of California on 3-6-14.	NEEDS/PROBLEMS/COMMENTS: 1. Need proof of establishment of guardianship or equivalent in Missouri pursuant to Probate Code §2352(d).	
Cont. from 071814				
Aff.Sub.Wit.				The Court set the matter for hearing on 3-19-14.
Verified				At the hearing on 3-19-14, the Court granted the petition and set this status hearing for the filing of proof of guardianship in Missouri.
Inventory				
PTC				
Not.Cred.				
Notice of Hrg				
Aff.Mail				
Aff.Pub.				
Sp.Ntc.				
Pers.Serv.				
Conf. Screen		Status Report filed 7-9-14 states the family move to Springfield, Missouri on 3-22-14. Since moving, Caitlin and Autumn have been doing well and are in communication with their parents. On 6-23-14, Mrs. Lanier met with an attorney from Legal Services of Southern Missouri, who told her that guardianship could not be established in Missouri until they had resided there for six months pursuant to the Uniform Child Custody Jurisdiction and Enforcement Act. Mrs. Lanier intends to contact the attorney in October to establish guardianship.		
Letters				
Duties/Supp				
Objections				
Video Receipt				
CI Report				
9202				
Order				
Aff. Posting				
Status Rpt			Mrs. Lanier therefore requests that the Court postpone the status hearing until after November 15, 2014, and that the California Guardianship remain in full force and effect until guardianship in Missouri can be established.	
UCCJEA				
Citation				
FTB Notice				
		Reviewed by: skc		
		Reviewed on: 11-12-14		
		Updates:		
		Recommendation:		
		File 18 – Lanier		

Petition for Appointment of Probate Conservator of the Person and Estate (Prob. C.
 1820, 1821, 2680-2682)

		NO TEMP REQUESTED	NEEDS/PROBLEMS/COMMENTS:
		ASMAHAN SALAYMEH, Spouse, is Petitioner and requests appointment as Conservator of the Person.	Court Investigator advised rights on 8-1-14.
		Note: The box for conservatorship of the estate is also checked in the title of the petition; however, Section 1.b. which is the request for conservatorship of the estate is blank.	Voting rights affected – need minute order.
Cont. from 081214, 093014			Minute Order 9-30-14: No appearances. Petitioner has been given several opportunities to cure defects. The Court removes Petitioner and appoints Public Guardian. Continued to 11-18-14.
	Aff.Sub.Wit.		Note: Pursuant to an email received by Examiner 10-3-14 from County Counsel's office, Deputy Public Guardian Renee Garcia learned that the proposed Conservatee died on September 17, 2014. However, nothing has been filed.
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
	Notice of Hrg	X	
	Aff.Mail	X	
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.	X	
✓	Conf. Screen		
✓	Letters		
✓	Duties/Supp		
	Objections		
	Video Receipt	X	
✓	CI Report		
	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation	X	
	FTB Notice		
		Voting rights affected.	
		Capacity Declaration was filed 12-3-13.	
		Petitioner states her husband had a heart attack on 9-9-12. Since then, he has been in a coma and non-responsive. He is on a feeding tube and is currently at Horizon nursing home.	
		Court Investigator Jennifer Daniel filed a report on 8-5-14.	
			Reviewed by: skc
			Reviewed on: 11-12-14
			Updates:
			Recommendation:
			File 19 – Salaymeh

Petition for Termination of Guardianship

Age: 11 months	EVELYN OKOEGWALE, maternal aunt, is Petitioner.		NEEDS/PROBLEMS/COMMENTS: 1. Need <i>Notice of Hearing</i> . 2. Need proof of service by mail of <i>Notice of Hearing</i> with a copy of the <i>Petition for Termination of Guardianship</i> <u>or</u> Consent & Waiver of Notice <u>or</u> Declaration of Due Diligence for: a. Wendy Okegwale (guardian) b. Monisha Okegwale (mother) c. Father (unknown) d. Paternal grandparents (unknown)
Cont. from			
Aff.Sub.Wit.	Father: UNKNOWN		
✓ Verified	Mother: MONISHA OKOEGWALE		
Inventory	Paternal grandparents: UNKNOWN		
PTC	Maternal grandfather: <i>Deceased</i>		
Not.Cred.	Maternal grandmother: <i>Deceased</i>		
Notice of Hrg	x	Petitioner alleges that the minor is currently in the care of a non-relative who has lied to the court and stated that she is the maternal grandmother. The minor is currently living in the home with a man who repeatedly raped the mother Monisha. Court Investigator Jennifer Daniel filed a report on 11/07/14.	
Aff.Mail	x		
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.			
Conf. Screen			
Letters			
Duties/Supp			
Objections			
Video Receipt			
✓ CI Report		Reviewed by: JF Reviewed on: 11/12/14 Updates: Recommendation: File 20A - Okegwale	
9202			
✓ Order			
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
FTB Notice			

20B Zahry Nea Okoegwale (GUARD/P)
Atty Okoegwale, Wendy (pro per – maternal step-grandmother/guardian)
Atty Okegwale, Evelyn (pro per – maternal aunt/Petitioner)

Case No. 13CEPR01126

Petition for Appointment of Guardian of the Person (Prob. C. 1510)

Age: 9 months	EVELYN OKOEGWALE , maternal aunt, is Petitioner.	NEEDS/PROBLEMS/COMMENTS: 1. Need Notice of Hearing. 2. Need proof of service of Notice of Hearing with a copy of the Petition for Termination of Guardianship at least 15 days before the hearing <u>or</u> Consent & Waiver of Notice <u>or</u> Declaration of Due Diligence for: e. Wendy Okoegwale (guardian) – <i>Personal service required</i> f. Monisha Okoegwale (mother) – <i>Personal service required</i> g. Father (unknown) – <i>Personal service required</i> h. Paternal grandparents (unknown) – <i>Service by mail sufficient</i> <u>Note:</u> Eric Rivera previously filed a Petition to Terminate the Guardianship that was denied on 08/14/14. Mr. Rivera claims to be the father of the minor, however the mother denied that he was the father.
Cont. from	WENDY OKOEGWALE , maternal step-grandmother, was appointed as guardian of the minor on 03/04/14. – <i>Declaration of Due Diligence filed 09/12/14</i>	
<input type="checkbox"/> Aff.Sub.Wit.		
<input checked="" type="checkbox"/> Verified	Father: UNKNOWN Mother: MONISHA OKOEGWALE	
<input type="checkbox"/> Inventory		
<input type="checkbox"/> PTC	Paternal grandparents: UNKNOWN	
<input type="checkbox"/> Not.Cred.		
<input type="checkbox"/> Notice of Hrg	x Maternal grandfather: <i>Deceased</i> Maternal grandmother: <i>Deceased</i>	
<input type="checkbox"/> Aff.Mail	x	
<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv.	x	
<input checked="" type="checkbox"/> Conf. Screen	Petitioner alleges that the minor is currently in the care of a non-relative who has lied to the court and stated that she is the maternal grandmother. The minor is currently living in the home with a man who repeatedly raped the mother Monisha.	
<input checked="" type="checkbox"/> Letters		
<input checked="" type="checkbox"/> Duties/Supp	Court Investigator Jennifer Daniel filed a report on 11/07/14.	
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input checked="" type="checkbox"/> CI Report		
<input type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input checked="" type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		
		Reviewed by: JF
		Reviewed on: 11/12/14
		Updates:
		Recommendation:
		File 20B - Okoegwale

20B

Petition for Letters of Administration; Authorization to Administer Under IAEA (Prob. C. 8002, 10450)

DOD: 01/31/2010		LORENZO PEREZ SAMBRANO , son is petitioner and requests appointment as Administrator without bond. All heirs waive bond Full IAEA – o.k. Decedent died intestate Residence: Clovis Publication: The Fresno Bee <u>Estimated value of the Estate</u> Personal property \$437.00 Real property \$60,000.00 Total \$60,437.00 Probate Referee: Steven Diebert	NEEDS/PROBLEMS/COMMENTS: Note: A Final Inventory and Appraisal was filed on 11/05/2014 showing real property valued at \$60,437.00, therefore no status hearing was provided for the filing of the Inventory and Appraisal. Note: If the petition is granted status hearings will be set as follows: • Tuesday, 01/19/2016 at 9:00a.m. in Dept. 303 for the filing of the first account and final distribution. Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior to the hearings on the matter the status hearing will come off calendar and no appearance will be required.
Cont. from 082614, 100714			
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg		
<input checked="" type="checkbox"/>	Aff.Mail w/		
<input checked="" type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input checked="" type="checkbox"/>	Letters		
<input checked="" type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
		Reviewed by: LV Reviewed on: 11/12/2014 Updates: Recommendation: Submitted File 21 – Sambrano	

22

Eli Carl Alvarado (GUARD/P)

Case No. 14CEPR00677

Atty

Alvarado, Wally Lupe (Pro Per – Maternal Grandfather – Petitioner)

Atty

Martinez, Clara Mendoza (Pro Per – Maternal Step-Grandmother – Petitioner)

Atty

Martinez-Lucero, Andrea (Pro Per – Nonrelative – Petitioner)

Atty

Lucero, Phillip (Pro Per – Nonrelative – Petitioner)

Petition for Appointment of Guardian of the Person (Prob. C. 1510)

		TEMP EXPIRES 10-6-14	NEEDS/PROBLEMS/COMMENTS:
		WALLY L. ALVARADO , maternal grandfather, CLARA MENDOZA MARTINEZ , maternal step-grandmother, and nonrelatives ANDREA and PHILLIP LUCERO , are Petitioners.	Note: The minor is currently residing with Petitioners Phillip and Andrea Lucero, non-relatives, in Sanger, CA. Note: If notice to the unknown father and paternal grandparents is not dispensed, the Court may require notice pursuant to Probate Code §1511 or further diligence.
Cont. from 100614		Father: UNKNOWN Mother: SARAH BETH ALVARADO - Personally served 8-2-14 - Objection filed 9-17-14	
<input type="checkbox"/>	Aff.Sub.Wit.		Minute Order 10-6-14: Mother, Sarah Alvarado is present in court and objects to the guardianship. Mother is ordered to file written objections and provide the necessary service to the petitioners by 10/20/14. The Court finds that it would be detrimental to grant visitation to mother as this time. Mother's request for visitation is denied without prejudice. The court investigator is ordered to maintain contact with the petitioners and obtain an updated report from the therapist regarding visits with mother. Mother is ordered to provide a report to the court investigator regarding her mental health progress. In addition, mother is to provide updated contact information to the court investigator. Mother provides contact information to the Court. Matter continued to 11/18/14. Temporary extended to 11/18/14. Court Investigator Dina Calvillo filed a Supplemental Report 11-14-14.
<input checked="" type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg		
<input type="checkbox"/>	Aff.Mail		
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input checked="" type="checkbox"/>	Pers.Serv.		
<input checked="" type="checkbox"/>	Conf. Screen		
<input checked="" type="checkbox"/>	Letters		
<input checked="" type="checkbox"/>	Duties/Supp		
<input checked="" type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input checked="" type="checkbox"/>	CI Report		
<input checked="" type="checkbox"/>	Clearances		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input checked="" type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
		<p>Paternal grandparents: UNKNOWN</p> <p>Maternal grandmother: DECEASED</p> <p>Petitioners state the mother has a drug problem and is a sex addict. She doesn't have the ability to provide a safe and healthy environment for the child. She lacks the means and mental stability to do so. The mother is currently being held as a 5150 WIC patient in Modesto, CA, and is being evaluated as a 5250 WIC as well.</p> <p>Sarah B. Alvarado (Mother) filed an Objection on 9-17-14. Ms. Alvarado states she appreciates the help her family has given her with her son in her time of need. She unfortunately had a complete breakdown with the things that happened in her past and the passing of her mother. She was diagnosed manic depressive in July and since then has received treatment and has been regularly taking her medication and going to therapy. She is continuing her education to continue on in her career as a nurse to benefit her life and her children's lives. Ms. Alvarado states she has a safe, stable living environment and the best place for her son is with her and his sister. She is accused of using drugs, and she will test clean. She is accused of having no place to live, but she can provide an address. Ms. Alvarado states she was previously residing with her father, but that was not healthy. Please see Objection for additional details.</p> <p>Court Investigator Dina Calvillo filed a report on 9-25-14.</p>	
		Reviewed by: skc Reviewed on: 11-12-14 Updates: Recommendation: File 22 - Alvarado	

22

Petition for Appointment of Probate Conservator of the Person (Prob. C. 1820,
1821, 2680-2682)

			NO TEMP REQUESTED	NEEDS/PROBLEMS/COMMENTS:
			DONELL REGINA STIERS and PAUL MICHAEL LOPEZ , Parents, are Petitioners and request appointment as Co-Conservators of the Person with medical consent powers under Probate Code §2355.	<u>Court Investigator advised rights on 10-29-14</u>
			Voting rights <u>NOT</u> affected	<p>1. The Notice of Hearing filed 10-9-14 includes a Proof of Service by Mail for all relatives; however, the document indicates "hand delivered" by some names. The Court may require Proof of Personal Service to be filed regarding:</p> <ul style="list-style-type: none"> - Amelia Lopez (Sister) - Greta Lopez (Sister) - Otto Lopez (Brother) - Raquel Lopez (Sister) - Jose Lopez (Brother) <p>2. Need video receipt pursuant to Local Rule 7.15.8.A.</p>
			A Capacity Declaration was filed 10-15-14.	
			Petitioners state the proposed Conservatee suffers from mild mental retardation, developmental delay, severe speech and language delay, OCD, ADHD, Dysthemia, ODD. He is unable to make decisions on his own or take care of daily living activities, such as take bus or other transportation to the doctor, report his activities and/or symptoms in an understandable way, obtain a prescription and take medication without someone to remind and monitor him. He has the same issues with ensuring he has a healthy diet, appropriate clothing, providing for his safety, managing his money, attending to deadlines for activities (social, school, medical, legal).	
<input type="checkbox"/>	Aff.Sub.Wit.			
✓	Verified			
<input type="checkbox"/>	Inventory			
<input type="checkbox"/>	PTC			
<input type="checkbox"/>	Not.Cred.			
✓	Notice of Hrg			
✓	Aff.Mail	w		
<input type="checkbox"/>	Aff.Pub.			
<input type="checkbox"/>	Sp.Ntc.			
✓	Pers.Serv.	w		
✓	Conf. Screen			
✓	Letters			
✓	Duties/Supp			
<input type="checkbox"/>	Objections			
<input type="checkbox"/>	Video Receipt	x		
✓	CI Report			
<input type="checkbox"/>	9202			
✓	Order			
<input type="checkbox"/>	Aff. Posting			
<input type="checkbox"/>	Status Rpt			
<input type="checkbox"/>	UCCJEA			
✓	Citation			
<input type="checkbox"/>	FTB Notice			
				Reviewed by: skc
				Reviewed on: 11-12-14
				Updates:
				Recommendation:
				File 23 - Lopez

Petition to Determine Succession to Real Property (Prob. C. 13151)

DOD: 6-13-14		JUANA M. AGUILAR and BENJAMIN AGUILAR are Petitioners. (Relationships not stated.) 40 days since DOD No other proceedings I&A: \$106,101.21 (residential real property valued at \$105,000.00 plus cash of \$1,101.21) Decedent died intestate (?) Petitioners request (?) (#13 is blank)	NEEDS/PROBLEMS/COMMENTS: 1. The petition is blank at #9a(2). Was the decedent survived by any children? 2. The petition is blank at #9a(3). Was the decedent survived by issue of a predeceased child? 3. #10 is blank. Need information, if applicable. 4. Petitioners did not attach Attachment 11, which should provide the legal description of the real property and a description of any personal property included in this petition, and should also state what the decedent's interest in the real and personal property is. 5. #12 and #15 indicate that there was a will; however, #5 indicated that the decedent died intestate. Need clarification and will, if any. 6. #13 is blank. Need specific property interest claimed by each petitioner in the real and personal property. 7. #14 is blank. Need list of heirs, including petitioners, and their relationship to the decedent. 8. #16 indicates that the petitioners are trustees of a trust. Need clarification and Attachment 16. 9. #17 is checked re conservatorship, but no names are provided. Need clarification and Attachment 17. 10. Need revised order, including legal description of real property.	
<input type="checkbox"/>	Aff.Sub.Wit.			
<input checked="" type="checkbox"/>	Verified			
<input checked="" type="checkbox"/>	Inventory			
<input type="checkbox"/>	PTC			
<input type="checkbox"/>	Not.Cred.			
<input type="checkbox"/>	Notice of Hrg			x
<input type="checkbox"/>	Aff.Mail			x
<input type="checkbox"/>	Aff.Pub.			
<input type="checkbox"/>	Sp.Ntc.			
<input type="checkbox"/>	Pers.Serv.			
<input type="checkbox"/>	Conf. Screen			
<input type="checkbox"/>	Letters			
<input type="checkbox"/>	Duties/Supp			
<input type="checkbox"/>	Objections			
<input type="checkbox"/>	Video Receipt			
<input type="checkbox"/>	CI Report			
<input type="checkbox"/>	9202			
<input checked="" type="checkbox"/>	Order			x
<input type="checkbox"/>	Aff. Posting			
<input type="checkbox"/>	Status Rpt			
<input type="checkbox"/>	UCCJEA			
<input type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			

Reviewed by: skc
Reviewed on: 11-12-14
Updates:
Recommendation:
File 24 - Aguilar

Petition for Appointment of Guardian of the Estate (Prob. C. 1510)

		NO TEMP REQUESTED	NEEDS/PROBLEMS/COMMENTS:
		ALVIN MOULTRIE , Father, is	<u>Note:</u> Pages 25 and 26 are related cases.
		Petitioner and requests	
		appointment as Guardian of the	Need amended petition. Deficiencies include,
		Estate. (Bond not addressed.)	but may not be limited to:
<input type="checkbox"/>	Aff.Sub.Wit.		<ul style="list-style-type: none"> • #1 is incomplete at the beginning. • #1a is filled out for guardianship of the person. • #1b is incomplete for guardianship of the estate. • #1c is incomplete re bond. • #7 (Character and estimated value of property of the estate) is incomplete. • #8 (Reason for guardianship) is incomplete. • Child Information Attachment at #2 (List of relatives) is incomplete. • Child Information Attachment at #4 (Reason why appointing Petitioner would be best) is incomplete. • Petitioner filed a Declaration of Due Diligence, but it is blank. • Need Notice of Hearing. • Need proof of service of Notice of Hearing with a copy of the petition on all relatives required to be given notice pursuant to Probate Code §1511.
<input checked="" type="checkbox"/>	Verified	Mother: CYNTHIA LYNNE WATKINS	
<input type="checkbox"/>	Inventory	- Deceased	
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.	Paternal Grandfather: Not listed	
<input type="checkbox"/>	Notice of Hrg	Paternal Grandmother: Not listed	
<input type="checkbox"/>	Aff.Mail	Maternal Grandfather: Not listed	
<input type="checkbox"/>	Aff.Pub.	Maternal Grandmother: Not listed	
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.	Estimated value of estate: Not provided	
<input checked="" type="checkbox"/>	Conf. Screen	Petitioner states ??	
<input checked="" type="checkbox"/>	Letters	(#8 of the petition is blank. No reason for guardianship of the estate is provided.)	
<input checked="" type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input checked="" type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
			Please note that pursuant to Local Rule 7.15.4, when the only asset is public assistance benefits, guardianship of the estate is not required.
			Please also see Local Rule 7.8.1.I: It is the policy of the Court to block all funds in guardianship estates.
			Petitioner may wish to seek legal advice from an attorney to confirm whether guardianship of the estate is appropriate. If granted, there are additional requirements, including inventory and appraisal and annual accountings that will need to be prepared in accordance with the Probate Code and other applicable law.
			Reviewed by: skc
			Reviewed on: 11-13-14
			Updates:
			Recommendation:
			File 25 - Moultrie

Petition for Appointment of Guardian of the Estate (Prob. C. 1510)

			NO TEMP REQUESTED	NEEDS/PROBLEMS/COMMENTS:
			ALVIN MOULTRIE , Father, is	<u>Note:</u> Pages 25 and 26 are related cases.
			Petitioner and requests	<u>Need amended petition. Deficiencies include, but may not be limited to:</u>
			appointment as Guardian of the	<ul style="list-style-type: none"> • #1 is incomplete at the beginning. • #1a is filled out for guardianship of the person. • #1b is incomplete for guardianship of the estate. • #1c is incomplete re bond. • #7 (Character and estimated value of property of the estate) is incomplete. • #8 (Reason for guardianship) is incomplete. • Child Information Attachment at #2 (List of relatives) is incomplete. • Child Information Attachment at #4 (Reason why appointing Petitioner would be best) is incomplete. • Petitioner filed a Declaration of Due Diligence, but it is blank. • Need Notice of Hearing. • Need proof of service of Notice of Hearing with a copy of the petition on all relatives required to be given notice pursuant to Probate Code §1511.
			Estate. (Bond not addressed.)	
	Aff.Sub.Wit.		Mother: CYNTHIA LYNNE WATKINS	
✓	Verified		- Deceased	
	Inventory		Paternal Grandfather: Not listed	
	PTC		Paternal Grandmother: Not listed	
	Not.Cred.		Maternal Grandfather: Not listed	
	Notice of Hrg	x	Maternal Grandmother: Not listed	
	Aff.Mail	x	Estimated value of estate: Not provided	
	Aff.Pub.		Petitioner states ??	
	Sp.Ntc.		(#8 of the petition is blank. No reason for guardianship of the estate is provided.)	
	Pers.Serv.	x		
✓	Conf. Screen			
✓	Letters			
✓	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report			
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
✓	UCCJEA			
	Citation			
	FTB Notice			
				Please note that pursuant to Local Rule 7.15.4, when the only asset is public assistance benefits, guardianship of the estate is not required.
				Please also see Local Rule 7.8.1.I: It is the policy of the Court to block all funds in guardianship estates.
				Petitioner may wish to seek legal advice from an attorney to confirm whether guardianship of the estate is appropriate. If granted, there are additional requirements, including inventory and appraisal and annual accountings that will need to be prepared in accordance with the Probate Code and other applicable law.
				Reviewed by: skc
				Reviewed on: 11-13-14
				Updates:
				Recommendation:
				File 26 - Moultrie